

CATS Reports Manual

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Part 1 - About Reports

We are very pleased to – well, report – that the new database includes a feature that allows you to create reports about the performance of your volunteers (and other resources, i.e. Sponsor staff and partners) as well as your agency.

There are several report features in the CATS database

- Print Reports (PDF)
 - CCR form
 - Public & Media Report form
 - Timesheet
- Export to Excel Reports
 - Work Queue
 - Timesheet Queue
- Summary Reports
 - Organization Listing
 - Resource Listing
 - Time Period Report
 - Training Event Listing
 - PMA Listing
- Aggregate Reports
 - PMA Aggregate
 - CCR Aggregate
 - Work Queue Activity
 - Sponsor Performance Measurers

In general, you can create these reports as PDF documents or as Excel spreadsheets. The following pages detail each of these reports, including samples of each and instructions to create them.

In addition, we are thinking about some other reports that will be created on a routine basis, by SHIBA staff, based on the data in the CATS system. We will count on you – our Sponsors and volunteers -- to shape these.

Thank you for all your hard work.

Part 2 - Organization Listing

The Organization Listing displays the following:

- The date the report was created
- Status of the organization – All, Active, Inactive
- The SHIBA ID of the person who created the report
- The name(s) of the counties under contract with this organization
- The name of the Regional Manager responsible for the performance of this organization
- Contact information for the organization
 - Name
 - Address
 - Phone
 - FAX
- For each Resource assigned to each/this county, for this Organization
 - Primary Contact (if specified, Y)
 - Type(s) – the role(s) of the Resource
 - Contact Name
 - E-mail address
- The number of resources assigned to each/this county, for this Organization

NOTE: the number of resources (i.e., volunteers) is counted for each County. So, a Sponsor with contracts for more than one county will need to be careful not to ‘double count’ volunteers, when using this report.



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Organization Listing

Report Format:
Excel

Status:
Active

Run Report

**State of Washington Office of the Insurance Commissioner
Statewide Health Insurance Benefites Advisors (SHIBA) HelpLine
Sponsor / Grantee Directory (As of March 13, 2006)**

Status: Active

Run by: sysadmin

Organization		Address	Phone	Fax
Primary	Resource Type(s)	Contact Name	E-Mail Address	

Adams Warick, Stacey

All-Ways Helping Organization		3531 Condit St Highland, Washington, 46322	555-555-5555	
Y	Administrative Support, Volunteer Coordinator	Carpenter, Gordon	SHIBOPADVANCED@HOTMAIL.COM	

Number of Resources: 1

Community Choice		Main Office Wenatchee, Washington, 12345	123-456-7899	
No Resources assigned to this organization				

Community Choise		sljfflksjflskdflsldf Moses Lake, Washington, 12345	509-987-4561	
No Resources assigned to this organization				

Office of the Insurance Commissioner		5000 Tumwater Blvd Tumwater, Washington, 98001		
N	Administrative Support, SHIBA / OIC Staff	Admin, System	fredh@oic.wa.gov	
N	SHIBA / OIC Staff	Super, User	tomb@oic.wa.gov	
N	SHIBA / OIC Staff	Guest, User	tombabington@sierrasystems.com	
N	SHIBA / OIC Staff	Johnson, Tobi	tobjj@oic.wa.gov	
N	SHIBA / OIC Staff	Warick, Stacey	staceyw@oic.wa.gov	
N	SHIBA / OIC Staff	Nations, Jeanne	jeannen@oic.wa.gov	
N	SHIBA / OIC Staff	Nguyen, Gauhar	gauharn@oic.wa.gov	
N	SHIBA / OIC Staff	Smolen, Tim	tims@oic.wa.gov	
N	Other	Advanced, User	jeffhornby@sierrasystems.com	
N	Other	Basic, User	texasbab1@yahoo.com	
N	SHIBA / OIC Staff	Goodwin, Jennifer	jenniferg@oic.wa.gov	
N	SHIBA / OIC Staff	Butler, Vanessa	vanessab@oic.wa.gov	


Number of Resources: 12

Part 3 - Resource Listing

The Resource Listing displays the following:

- The date the report was created
- Which organization(s) are included in the report
- The status of Resources displayed in the report – All, Active, Inactive, Leave (of Absence)
- SHIBA ID of the person who created the report
- Information for each Resource
 - Contact Name
 - SHIBA ID
 - Resource Type(s)
 - Language(s) other than English
 - The Coverage Area Team (County) to which the volunteer is assigned
 - Contact phone number(s)
 - E-mail address
 - The Organization name
 - Last name
 - First name
 - Status
- For each County under contract for this Organization
 - The number of resources assigned to each/this county

NOTE: the number of resources (i.e. volunteers) is counted for each County. So, a Sponsor with contracts for more than one county will need to be careful not to 'double count' volunteers, when using this report.



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Resource Contact List Report

Report Format:

Organization:

Volunteer / Partner Type:
☐ ALL
DIRECT SERVICE
☐ Counselor
☐ Outreach
☐ Public Speaker
☐ Administrative Support
COORDINATORS / MANAGERS
☐ Contract Manager
☐ Program Manager
☐ Volunteer Coordinator
☐ Sponsor Staff
☐ Community Partner Staff
☐ SHIBA / OIC Staff
☐ Other

Resource Status:

**State of Washington Office of the Insurance Commissioner
Statewide Health Insurance Benefits Advisors (SHIBA) HelpLine
Active Resource Contact List for March 13, 2006**

Organization Name: ALL Run By: sysadmin

Status: Active


Contact Name	SHIBA ID	Resource Type(s)	Language(s)	Team / County	Phone # - Day	Phone # - Evening	Phone # - Cell	Email	Organization Name	Last Name	First Name	Status
Nations, Jeanne	jeannen	SHIBA / OIC Staff	Other	Clark	360-725-7030			jeannen@oic.wa.gov	Senior Helpers	Nations	Jeanne	Active
<i>Clark Totals:</i>												
Nations, Jeanne	jeannen	SHIBA / OIC Staff	Other	Klickitat	360-725-7030			jeannen@oic.wa.gov	Senior Helpers	Nations	Jeanne	Active
TATE, Dorothy	dorothy	Counselor		Klickitat	111-111-1111				Senior Helpers	TATE	Dorothy	Active
<i>Klickitat Totals:</i>												
Harvey, Judy	judy	Volunteer Coordinator		Skamania	124-124-1247			shibopsuper@hotmail.com	Senior Helpers	Harvey	Judy	Active
Nations, Jeanne	jeannen	SHIBA / OIC Staff	Other	Skamania	360-725-7030			jeannen@oic.wa.gov	Senior Helpers	Nations	Jeanne	Active
<i>Skamania Totals:</i>												
Senior Helpers Total Active Resources:												
5												
Ludtke, Elaine	ludtke	Sponsor Staff		King	555-555-5555			ludtke@whidbey.com	Senior Services of Seattle/King County	Ludtke	Elaine	Active
Osborne, Terri	tosborn	SHIBA / OIC Staff		King	360-725-7100			terrio@oic.wa.gov	Senior Services of Seattle/King County	Osborne	Terri	Active
Porter, Adam	adam	Volunteer Coordinator		King	206-268-6715	206-448-5766		adam@seniorservices.org	Senior Services of Seattle/King County	Porter	Adam	Active
van Wageningen, Dave	dvanwageningen	Administrative Support		King	253-473-5700			dvanwageningen@yahoo.com	Senior Services of Seattle/King County	van Wageningen	Dave	Active
Wong, Lorraine	lwong	Sponsor Staff		King	555-555-5555			llw1632@kendra.com	Senior Services of Seattle/King County	Wong	Lorraine	Active
<i>King Totals:</i>												
Senior Services of Seattle/King County Total Active Resources:												
5												
cat, max	maxc	Outreach, Other	Korean	Cowlitz	222-222-2222			maxcat@oic.wa.gov	Steeler's Fan Club	cat	max	Active
Smolen, Tim	tsmolen	SHIBA / OIC Staff		Cowlitz	360-725-7108			tims@oic.wa.gov	Steeler's Fan Club	Smolen	Tim	Active
<i>Cowlitz Totals:</i>												
2												
cat, max	maxc	Outreach, Other	Korean	Wahkiakum	222-222-2222			maxcat@oic.wa.gov	Steeler's Fan Club	cat	max	Active
Marquis, Stephanie	smarqui	Counselor		Wahkiakum	360-725-7108			tim.smolen@comcast.net	Steeler's Fan Club	Marquis	Stephanie	Active
<i>Wahkiakum Totals:</i>												
2												
Steeler's Fan Club Total Active Resources:												
4												
Warick, Conner	connerw	Public Speaker		King	360-725-7030				The Warick Family	Warick	Conner	Active
Warick, Randy	randyw	Public Speaker		King	360-725-7030				The Warick Family	Warick	Randy	Active
<i>King Totals:</i>												
2												
Warick, Conner	connerw	Public Speaker		Pierce	360-725-7030				The Warick Family	Warick	Conner	Active
<i>Pierce Totals:</i>												
1												
Warick, Conner	connerw	Public Speaker		Thurston	360-725-7030				The Warick Family	Warick	Conner	Active
<i>Thurston Totals:</i>												
1												
Warick, Conner	connerw	Public Speaker		Yakima	360-725-7030				The Warick Family	Warick	Conner	Active
Warick, Randy	randyw	Public Speaker		Yakima	360-725-7030				The Warick Family	Warick	Randy	Active
<i>Yakima Totals:</i>												
2												
The Warick Family Total Active Resources:												
6												

Part 4 - Timesheet Period Report

The Timesheet (Listing) Period Report displays the following:

- The date the report was created
- Which organization(s) are included in the report
- The status of Resources displayed in the report – All, Active, Inactive, Leave (of Absence)
- The start period and end period for the report (which month(s) are included)
- SHIBA ID of the person who created the report
- For each Resource – for whom a timesheet was recorded
 - Contact Name
 - Organization name
 - Resource Type(s)
 - Days worked
 - Hours worked
- For each Resource – for whom a timesheet was not recorded
 - Contact Name
 - Resource Type(s)
 - Month(s) missing

NOTE: If the report is run for more than one period [month] the number of days worked and hours of work are cumulative.



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Volunteer Timesheet Period Report

Report Format:
Excel

Organization:
Senior Helpers

Owner:
All

Period Start Date:
January 2006 to January 2006

Run Report

**State of Washington Office of the Insurance Commissioner
Statewide Health Insurance Benefits Advisors (SHIBA) HelpLine
Timesheet Listing (As of 3/14/2006)**

Organization: Senior Helpers Run by: sysadmin
Resource: All
Start Period: January, 2006
End Period: January, 2006

Contact Name	Organizations	Resource Types	Days Worked	Hours Worked
Harvey, Judy	Senior Helpers	Volunteer Coordinator	2	7
Resource Totals:			2	7

Resources Missing Period Timesheets


Contact Name	Resource Type	Month Missing
Nations, Jeanne	SHIBA / OIC Staff	January, 2006
TATE, Dorothy	Counselor	January, 2006

Part 5 - Training Event Listing

The Training Event Listing displays the following:

- The date the report was created
- Which organization(s) are included in the report
- The status of Course displayed in the report – All, Open, Closed, Cancelled
- SHIBA ID of the person who created the report
- Information for each Course
 - Date
 - Location (County)
 - Course group (Initial Course = Basic Training; Update = Update)
 - Module Name
 - Trainer
 - Start Time
 - Scheduled End Time
 - Actual End Time
 - Actual Attendance
 - Status

NOTE: A course is considered 'open' until the actual end time and actual attendance are recorded in the database. At that point, it is 'closed.'



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Training Event Report

Report Format:

Start Date:
 to

Status:

***State of Washington Office of the Insurance Commissioner
Statewide Health Insurance Benefits Advisors (SHIBA) HelpLine
Training Event Report (As of March 13, 2006)***

Start Date:

Run By: sysadmin

End Date:

Status: Open


Date	Location (County)	Course Group	Module Name	Trainer	Start Time	Scheduled End Time	Actual End Time	Actual Attendance	Status
7/4/2006	King	Initial Course	BH, CHIP, Medicaid	Nguyen, Gauhar	8:00:00 AM	10:00:00 AM			Open
4/5/2006	Thurston	Initial Course	Introduction to Health Insurance – Market and Terms	Verrier, Janet	8:00:00 AM	10:00:00 AM			Open
3/15/2006	Kitsap	Initial Course	LTC Policies	Smolen, Tim	8:00:00 AM	10:00:00 AM			Open
1/4/2005	Douglas	Initial Course	Medicare Part D Group Counseling	Porter, Adam	8:00:00 AM	10:00:00 AM			Open
7/4/2006	Lincoln	Initial Course	Outreach	Nguyen, Gauhar	8:00:00 AM	10:00:00 AM			Open
3/23/2006	King	Initial Course	Public Speaking	Nguyen, Gauhar	1:00:00 PM	3:00:00 PM			Open
3/1/2006	Ferry	Initial Course	SHIBA HelpLine New Volunteer Orientation	Basic, User	8:00:00 AM	10:00:00 AM			Open
7/4/2006	King	Initial Course	SHIBA HelpLine new volunteer orientation	Nguyen, Gauhar	9:00:00 AM	11:00:00 AM			Open
2/2/2006	Douglas	Update Course	UT-Fall1	House, Ron	8:00:00 AM	10:00:00 AM			Open
3/1/2006	Clark	Update Course	UT-Spring1	Nations, Jeanne	8:00:00 AM	10:00:00 AM			Open
7/4/2006	King	Update Course	UT-Spring1	Nguyen, Gauhar	9:00:00 AM	11:00:00 AM			Open
6/1/2006	Clallam	Update Course	UT-Spring2	Advanced, User	8:00:00 AM	10:00:00 AM			Open
7/1/2006	Clallam	Update Course	UT-Summer2	Parris, Janet	8:00:00 AM	10:00:00 AM			Open
1/1/2006	Clark	Update Course	UT-Winter1	Harvey, Judy	8:00:00 AM	10:00:00 AM			Open
1/1/2006	Clark	Update Course	UT-Winter1	Nations, Jeanne	8:00:00 AM	10:00:00 AM			Open
1/1/2006	Clark	Update Course	UT-Winter1	Nations, Jeanne	8:00:00 AM	10:00:00 AM			Open
4/2/2006	Thurston	Update Course	UT-Winter2	Marquis, Stephanie	8:00:00 AM	10:00:00 AM			Open

Part 6 - Public & Media Activity Listing

NOTE: This report is designed primarily for use by OIC staff to load information to the SHIBA HelpLine web site for use by all Sponsors, volunteers and consumers. It is not primarily a printed report.

The Public and Media Event Listing displays the following:

- The date the report was created
- Which organization(s) are included in the report
- The status of Course displayed in the report – All, Open, Closed, Cancelled
- SHIBA ID of the person who created the report
- Information for each Course
 - Date
 - Location (County)
 - Course group (Initial Course = Basic Training; Update = Update)
 - Module Name
 - Trainer
 - Start Time
 - Scheduled End Time
 - Actual End Time
 - Actual Attendance
 - Status



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Public & Media Activity Listing

Report Format:

County:

Start Date:
 to

Open to Public:

Run Report

**State of Washington Office of the Insurance Commissioner
Statewide Health Insurance Benefits Advisors (SHIBA) HelpLine
Public & Media Activity List (As of 3/13/2006)**

County: ALL Run By: sysadmin
Start Date:
End Date:
Open to Public: ALL

Event County	Start Date	Event Name	Activity Group	Activity Type	Event Coordinator	Event Assigned To	Start Time	End Time	Event Site	Contact Name
Adams	1/31/2006	Part D round-up	Community Education	H. Enrollment event	Carpenter, Gordon	Carpenter, Gordon	10:00:00 AM	1:00:00 PM	Senior Center	Carpenter, Gordon
Adams	1/31/2006	Part D round-up	Community Education	H. Enrollment event	Carpenter, Gordon	Carpenter, Gordon	10:00:00 AM	1:00:00 PM	Senior Ctr	Carpenter, Gordon
Adams	3/6/2006	PEBB Health Fair	Outreach Activities	B. Outreach Meeting (w/ community organization)	Carpenter, Gordon	Burrell, Cristy	8:00:00 AM	2:00:00 PM	Holiday Inn	Hughes, LIBBY
Klickitat	2/17/2006	Basic Health	Outreach Activities	B. Outreach Meeting (w/ community organization)	TATE, Dorothy	TATE, Dorothy	6:00:00 PM	10:00:00 PM	PUD #4	Chester, Sandi
Skamania	1/1/2006	SNAP	Community Education	A. Public Presentation (speaking engagement)	Waits, Arthur	Waits, Arthur	11:00:00 AM	12:30:00 PM	SNAP	Waits, Arthur
Skamania	1/1/2006	SNAP	Community Education	A. Public Presentation (speaking engagement)	Harvey, Judy	Waits, Arthur	11:00:00 AM	12:30:00 PM	SNAP	Waits, Arthur

Contact Phone	Contact Email	Event Address	Event City	Event State	Event Zip	Est Participation	Act Participation	Open to Public	Event Language(s)
333-333-3333	SHIBOPADVANCED@HOTMAIL.COM	Main St	Toledo	Washington	24686	27		Yes	
333-333-3333	SHIBOPADVANCED@HOTMAIL.COM	Main St	Toledo	Washington	24686	27		Yes	Spanish
		Spokane	Winlock	Washington	24682	150	124	No	
		Goldendale	Goldendale	Washington	00005	45		Yes	
454-454-4545	shibopbasic@hotmail.com	Leupke	Vancouver	Washington	98765	100	56	Yes	Spanish, Korean, Cantonese, Mandarin, Vietnamese, Tagalog, Russian, Cambodian
454-454-4545	shibopbasic@hotmail.com	Leupke	Vancouver	Washington	98765	100	56	Yes	Spanish, Korean, Cantonese, Mandarin, Vietnamese, Tagalog, Russian, Cambodian

Part 7 - Public & Media Activity Aggregate Report

The Public & Media Activity Aggregate Report displays the following:

- The date the report was created
- Which organization(s) are included in the report
- The start period and end period for the report (which months are included)
- The name(s) of the county(s) under the chosen organization
- The status of the activities displayed in the report (All, Complete, Incomplete)
- SHIBA ID of the person who created the report
- Information for each type of activity (Community Education and/or Outreach):
 - Number of Activities
 - Total Estimated Number of Participants
 - Total Actual Number of participants
 - Total Estimated Number Enrolled
 - Total Length of Activities
- Activity Language
 - Number of single language activities
 - Number of multiple language activities
 - Number of activities for which an interpreter was needed
 - Specific languages identified and the number of activities for each language
- Topic Focus
 - Identifies the number of activities by topic focus, i.e., SHIBA Helpline, Medicare and Non-Medicare.
- Target Audience
 - Identifies number of activities by Client Type and Demographics

- Activity Information
 - Identifies, by category, who conducted the activity.

NOTE: The section headings on the Aggregate Report do not coincide with the section headings on the form. This is due to CMS reporting requirements.

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Public & Media Activity Aggregates

Report Format:
Excel

Start Date:
 to

Organization:
All

Assigned To:
All

Event County:
ALL

Event Zip:

Complete Status:
All

[Run Report](#)

**State of Washington Office of the Insurance Commissioner
Statewide Health Insurance Benefits Advisors (SHIBA) HelpLine
Public & Media Activity Aggregate Report
(As of March 20, 2006)**

Start Date: 01/01/2006 **Organization:** All
End Date: 03/31/2006 **Assigned To:** All **Complete Status:** All
Event County: ALL **Event Zip:** **Run By:** sysadmin

SECTION 1 - Activity Type		(Minutes)				
	# of Activities	Total Est. # of Participants	Total Actual # of Participants	Total Est. # Enrolled	Total Length of Activities	
Community Education						
A. Public Presentation (speaking	24	645	565	410	3450	
B. Public Workshop (group	3	68	63	41	300	
C. Partner Training	3	55	50	5	630	
D. Media (newspaper / newsletter -	0	0	0	0	0	
E. Media (radio - not a PSA or ad)	1	5000	2	25	30	
F. Media (TV / cable show - not a	0	0	0	0	0	
G. Targeted information mailings	0	0	0	0	0	
H. Enrollment event	1	100	45	5	90	
I. Drop-in Counseling	0	0	0	0	0	
J. Other (please describe)	2	140	70	0	420	
Community Education Totals:	34	6008	795	486	4920	
Outreach Activities						
A. Public Presentation (speaking	18	421	330	123	1320	
B. Outreach Meeting (w/	4	80	66	17	570	
C. Networking Meeting (w/ other	1	10	8	0	120	
D. Media (newspaper / newsletter -	2	200	200	0	180	
E. Media (radio - not a PSA or ad)	0	0	0	0	0	
F. Media (TV / cable show - not a	2	10000	10000	2	210	
F. Media (public service	0	0	0	0	0	
G. Booth / Exhibit at Health or	0	0	0	0	0	
H. Targeted informational mailings	0	0	0	0	0	
I. Website (web postings, online	0	0	0	0	0	
J. Other (please describe)	0	0	0	0	0	
Outreach Activities Totals:	27	10711	10604	142	2400	
Grand Totals:	61	16719	11399	628	7320	

SECTION 2 - Activity Language	
	# of Activities
Single Language Activities	3
Multiple Language Activities	1
Interpreter Needed	2
Spanish	2
Korean	1
Cantonese	1
Mandarin	2
Vietnamese	1
Tagalog	1
Russian	1
Cambodian	1
Other	2

SECTION 3 - Topic Focus	
	# of Activities
SHIBA HelpLine	
Programs and services	42
Sponsorship	2
Partnership	2
Volunteerism	9
Other	5
Medicare	
Parts A and B	4
Medicare Health Plans (Part C)	13
Medicare Rx (Part D)	58
Low Income Subsidy (LIS)	20
Medigap / Supplement	30
Medicaid (Aged, Blind, Disabled)	15
Medicare Savings Programs (QMB, SLMB, Q1)	10
WSHIP (Basic/Basic Plus)	0
Retiree / Employer Plans	9
Plan Non-renewal	0
Other	0

Public Media Activity Aggregate Report

Non-Medicare		
	Basic Health	1
	Children's Health Insurance Program (CHIP)	0
	COBRA	0
	Dental	0
	Discount / Association plans	1
	Employer / Union / Retiree Plan	2
	Health Savings Account	0
	Individual commercial plans	2
	Long-Term Care	2
	Medicaid (Children and Family)	1
	Military / TRI-CARE	0
	Prescription Assistance Program	3
	Veterans' coverage	0
	WSHIP Plans 1 and 3	0
	Fraud and abuse	7
	Tribal Health Benefits	0
	Other	2

SECTION 4 - Target Audience		# of Activities
Client Type		
	Medicare beneficiaries and / or pre-enrollees	52
	Non-Medicare beneficiaries and / or pre-enrollees	32
	Family members / caregivers of Medicare beneficiaries	36
	Non-Medicare family members / caregivers	25
	Professionals (social services providers)	34
	Other (please describe)	4
Demographics		
	American Indian or Alaska Native	4
	Black or African-American	4
	Hispanic or Latino	6
	Asian	6
	Native Hawaiian or other Pacific Islander	4
	White, not of Hispanic origin	11
	Disabled	8
	Rural	4
	Low income	11

SECTION 5 - Activity Information		# of Presenters
Direct Service	Manually Entered	2
	Counselor	52
	Outreach	37
	Public Speaker	46
	Administrative Support	28
Coordinators / Managers	Contract Manager	1
	Program Manager	0
	Volunteer Coordinator	28
	Sponsor Staff	0
	Community Partner Staff	2
	SHIBA / OIC Staff	5
	Other	2

Part 8 - Client Contact Event Aggregate Report

The Client Contact Event Aggregate Report displays the following:

- The date the report was created
- Which organization(s) are included in the report
- The start period and end period for the report (which months are included)
- The name(s) of the county(s) under the chosen organization
- The status of the activities displayed in the report (All, Complete, Incomplete)
- SHIBA ID of the person who generated the report
- Activity Information includes:
 - Total number of activities
 - Total time spent for all activities
 - Average time spent per activity
- Contact Information includes:
 - Number of contacts by type, i.e., quick call, telephone, etc.
 - Number of initial contacts, total time and percentage of total
 - Number of multiple contacts, total time and percentage of total
- Client / Beneficiary information includes:
 - Number of contacts by client category, i.e., self, spouse, caregiver, etc.
 - Percentage of total by client category
- Client Demographics information includes number of contacts/events by the following categories:
 - Gender
 - Age range
 - Disabled
 - Race/Ethnicity

- Family size
- Monthly income
- Total assets

- SHIBA Helpline
 - Identifies by category, and number within each category, how the contact heard about the SHIBA HelpLine

- Topics Discussed
 - Indicates how many times a particular topic (Medicare, Non-Medicare, etc.) was discussed, along with the percentage of the total

- Complaints
 - Indicates the total number of complaints by category, i.e., Plan non-renewal, claim denied, etc.

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Client Contact Event Aggregates

Report Format:
Excel

Start Date:
 to

Organization:
All

Assigned To:
All

Client County:
ALL

Client Zip:

Complete Status:
All

Run Report

Done

**State of Washington Office of the Insurance Commissioner
Statewide Health Insurance Benefits Advisors (SHIBA) HelpLine
Client Contact Event Aggregate Report
(As of March 17, 2006)**

Start Date:	01/01/2006	Organization:	All	Complete Status:	All
End Date:	03/31/2006	Assigned To:	All	Run By:	sysadmin
Event County:	ALL	Event Zip:	ANY		

SECTION 1 - Activity Information

Total # of Activites	6
Total Time Spent (Minutes)	164
Average Time per Activity (Minutes)	27.33

SECTION 2 - Type of Contact

	Initial Contacts			Multiple Contacts		
	# Contacts	Total Time (Min)	% of Total	# Contacts	Total Time (Min)	% of Total
Quick Call (<10 min.)	2	11	33.33			
Telephone	1	80	16.67			
In Person (home visit)	1	32	16.67			
E-mail/fax/postal mail	1	4	16.67			
In Person (site)	1	37	16.67			
Totals:	6	164				

SECTION 3 - Client / Beneficiary

	# of Events	% of Total
Self	4	66.67
Spouse	0	.00
Caregiver / Family Member / Legal Rep	1	16.67
Agency / Social Services	1	16.67
Other	0	.00

SECTION 4 - Client Demographics

of Events

Gender

Female	3
Male	3

Age Range

0-19	0
51-64	1
20-30	0
65-74	3
31-40	0
75-84	0
41-50	0
85+	1
Declines to Disclose	0

Disabled

Yes	2
No	0
Declines to Disclose	3

Race / Ethnicity

American Indian or Alaska Native	1
Black / African-American	0
Asian	0
Hispanic / Latino	0
Native Hawaiian or other Pacific Islander	0
Mixed	0
White / Not of Hispanic Origin	2
Other	0
Declines to Disclose	2

Family Size

Declines To Disclose	0
Household Size: 1	2
Household Size: 2	0
Household Size: 3	0
Household Size: 4	0
Household Size: 4+	0

Monthly Income

Declines To Disclose	0
< \$800	1
\$801 to \$1,197	0
\$1,198 to \$1,603	0
> \$1,603	1

Total Assets

Declines To Disclose	0
< \$4,000	0
\$4,001 to \$6,000	0
\$6,001 to \$11,500	1
\$11,501 to \$23,000	1
> \$23,000	0

SECTION 5 - SHIBA HelpLine

of Events

Medical / Dental Provider	1
SHIBA HelpLine Presentation	0
Pharmacist	0
SHIBA HelpLine Publication	0
Social Service Agency	1
Health Fair	0
CMS / Medicare	0
Mailing	1
Social Security Administration	0
Poster	0
DSHS	1
Radio	0
Friend / Relative	1
TV	0
Declines to Disclose	2
Newspaper	0
Other	0
SHIBA HelpLine / OIC Website	0
Other Internet / Website	0

SECTION 6 - Topics Discussed

	# of Events	% of Total
MEDICARE		
Medicare (Parts A & B)		
Enrollment / Eligibility / Benefits	0	.00
Claims / Billing	0	.00
Appeals / Complaints	0	.00
Medicare (Parts A & B) Totals	0	.00
Medicare Health Plans / Advantage (Part C)		
Enrollment / Eligibility / Comparisons	0	.00
Plan / Benefit Changes / Non-renewals	0	.00
Claims / Billing	0	.00
Appeals / Complaints	0	.00
Medicare Health Plans / Advantage (Part C) Totals	0	.00
Prescription Drug Assistance - Medicare Rx (Part D)		
Plan Eligibility	1	16.67
Low Income Assistance (LIS)	2	33.33
Enrollment / Application Assistance	1	16.67
Claims / Billing	0	.00
Appeals / Complaints	0	.00
Prescription Drug Assistance - Medicare Rx (Part D) Totals	4	66.67
Medigap / Supplements		
Enrollment / Eligibility / Comparisons	0	.00
Changing Coverage	0	.00
Claims / Billing	0	.00
Appeals / Complaints	0	.00
Medigap / Supplements Totals	0	.00
Medicaid		
Medicare Savings Program (QMB / SLMB / QI)	0	.00
Medicaid (COPES, Aged, blind, disabled)	0	.00
Medicaid Totals	0	.00

Other Prescription Assistance	Union / Employer Plan	1	16.67
	Drug Company Assistance Plan	0	.00
	Discount Cards / Buyer's Clubs	0	.00
	Other	0	.00
	Other Prescription Assistance Totals	1	16.67
Other	Fraud / Abuse	1	16.67
	Customer Service Issues / Complaints	0	.00
	Claims / Billing	0	.00
	COBRA	0	.00
	Dental	0	.00
	Employer Plan	0	.00
	Health Savings Accounts	0	.00
	Long-Term Care	0	.00
	Military / TRICARE	0	.00
	Social Security Disability	0	.00
	Tribal Health Benefits	0	.00
	Veterans' Benefits	0	.00
	WSHIP (Basic, Basic Plus)	0	.00
	Other	0	.00
	Other Totals	1	16.67
	MEDICARE Totals	6	100.00

NON-MEDICARE			
Low-income Assistance			
	Basic Health	1	16.67
	Medicaid (family, pregnant, alien)	0	.00
	Medicaid (children's)	0	.00
	CHIP	0	.00
	Low-income Assistance Totals	1	16.67
Other Prescription Assistance			
	Union / Employer Plan	0	.00
	Drug Company Assistance Plan	0	.00
	Discount Cards / Assistance Plan	0	.00
	Other	0	.00
	Other Prescription Assistance Totals	0	.00
Other			
	Fraud / Abuse	0	.00
	Customer Services Issues / Complaints	0	.00
	Claims / Billing	0	.00
	COBRA	0	.00
	Dental	0	.00
	Employer Plan	0	.00
	Health Savings Accounts	0	.00
	Long-Term Care	0	.00
	Military / TRICARE	0	.00
	Social Security Disability	0	.00
	Tribal Health Benefits	1	16.67
	Veterans' Benefits	0	.00
	WSHIP (Basic, Basic Plus)	0	.00
	Other	0	.00
	Other Totals	1	16.67
	NON-MEDICARE Totals	2	33.33

SECTION 7 - Complaints	
	# of Events
Total Complaints	1
Plan non-renewal	0
Claim denied	0
Overcharged	0
Quality of care	0
Premium increase	1
Alleged / potential fraud	0
Benefits change / reduction	0
Misinformation / false claims	0
Access to Insurance	0
Access to Care	0
Potential Fraud/Abuse	0
Insurance Cancellation	0
Other	0

Part 9 - Work Queue Activity Report

- The Work Queue Activity Report displays the following:
 - The date the report was created
 - Which organization(s) are included in the report
 - The start period and end period for the report (which months are included)
 - SHIBA ID of the person who generated the report
 - For each organization – for which work activity is recorded:
 - County Name
 - Form Type
 - Owner Name
 - Number of Incomplete records
 - Number of Complete records
 - Total number of records
 - Percentage of records that are complete

Washington State
SHIBA
Statewide Health Insurance Benefits Advisors
HelpLine
Office of the Insurance Commissioner

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Work Queue Activity

Report Format:
Excel

Start Date:
 to

Organization:
All

Run Report

Status	Record #	Form	Type	Date	Owner	Date Entered	Entered By
Complete	TRS000023	Scheduled Course	Core 1	4/5/2006	judy	3/11/2006	sysadmin
Complete	TRS000022	Scheduled Course	Core 2	2/1/2006	judy	3/11/2006	sysadmin
Incomplete	TRS000021	Scheduled Course	UT-Winter1	1/1/2006	judy	3/11/2006	sysadmin
Incomplete	TRS000019	Scheduled Course	UT-Spring1	3/1/2006	jeannen	3/11/2006	judy
Incomplete	TRS000018	Scheduled Course	UT-Winter1	1/1/2006	jeannen	3/11/2006	judy
Incomplete	PMA000017	Public & Media Activities	B. Outreach Meeting (w/ community organization)	2/17/2006	dorothy	3/11/2006	judy
Complete	PMA000016	Public & Media Activities	A. Public Presentation (speaking engagement)	1/1/2006	arthur	3/11/2006	judy
Complete	PMA000015	Public & Media Activities	A. Public Presentation (speaking engagement)	1/1/2006	arthur	3/11/2006	judy
Incomplete	CCR000049	Client Contact	Telephone	3/7/2006	arthur	3/11/2006	judy

My Work Queue

Part 10 - Sponsor Performance Measures

The Sponsor Performance Measures Report displays the following:

- The date the report was created
- Which organization(s) are included in the report
- The name(s) of the county(s) under the chosen organization
- The start period and end period for the report (which months/years are included)
- SHIBA ID of the person who generated the report
- Total population of County/Work Area
- Total population to serve
- For each performance measure category:
 - current year number of activities
 - previous year number of activities
 - difference from previous year activities

Washington State
SHIBA
Small Business Health Insurance Benefits Advisors
HelpLine
Office of the Insurance Commissioner

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Sponsor Performance Measures

Report Format:
Excel

Organization:
ALL

County:
ALL

Start Date:
March 2006

End Date:
March 2006

[Run Report](#)

**State of Washington Office of the Insurance Commissioner
Statewide Health Insurance Benefits Advisors (SHIBA) HelpLine
Sponsorship Performance Measures
(As of March 17, 2006)**

Organization: All-Ways Helping Organization **Run by:** sysadmin
County: ALL
Start Month: January **Start Year:** 2006
End Month: March **End Year:** 2006

Total Population of County / Work Area:

Total Population to Serve:

Section1 - Counseling

	Current Year	Previous Year	Change
E-mail/fax/postal mail	1	0	1
In Person (home visit)	1	0	1
In Person (site)	1	0	1
TOTAL	3	0	3

Section 2 - Community Education

	Current Year Count	Previous Year Count	Change
A. Public Presentation (speaking engagement)	0	0	0
Total # of Attendees	0	0	0
Estimated # of Attendees	0	0	0
Estimated # Enrolled	0	0	0
B. Public Workshop (group counseling)	0	0	0
Total # of Attendees	0	0	0
Estimated # of Attendees	0	0	0
Estimated # Enrolled	0	0	0
C. Partner Training	0	0	0
Total # of Attendees	0	0	0
Estimated # of Attendees	0	0	0
Estimated # Enrolled	0	0	0

D. Media (newspaper / newsletter - article or interview)	0	0	0
Total # of Attendees	0	0	0
Estimated # of Attendees	0	0	0
Estimated # Enrolled	0	0	0
E. Media (radio - not a PSA or ad)	0	0	0
Total # of Attendees	0	0	0
Estimated # of Attendees	0	0	0
Estimated # Enrolled	0	0	0
F. Media (TV / cable show - not a PSA or ad)	0	0	0
Total # of Attendees	0	0	0
Estimated # of Attendees	0	0	0
Estimated # Enrolled	0	0	0
G. Targeted information mailings	0	0	0
Total # of Attendees	0	0	0
Estimated # of Attendees	0	0	0
Estimated # Enrolled	0	0	0
H. Enrollment event	2	0	2
Total # of Attendees	0	0	0
Estimated # of Attendees	27	0	27
Estimated # Enrolled	0	0	0
I. Drop-in Counseling	0	0	0
Total # of Attendees	0	0	0
Estimated # of Attendees	0	0	0
Estimated # Enrolled	0	0	0
J. Other (please describe)	0	0	0
Total # of Attendees	0	0	0
Estimated # of Attendees	0	0	0
Estimated # Enrolled	0	0	0

Section 3 - Outreach Activities

	Current Year Count	Previous Year Count	Change
A. Public Presentation (speaking engagement)	0	0	0
Total # of Attendees	0	0	0
Estimated # of Attendees	0	0	0
Estimated # Enrolled	0	0	0
B. Outreach Meeting (w/ community organization)	1	0	1
Total # of Attendees	124	0	124
Estimated # of Attendees	150	0	150
Estimated # Enrolled	24	0	24
C. Networking Meeting (w/ other partners)	0	0	0
Total # of Attendees	0	0	0
Estimated # of Attendees	0	0	0
Estimated # Enrolled	0	0	0
D. Media (newspaper / newsletter - article or interview)	0	0	0
Total # of Attendees	0	0	0
Estimated # of Attendees	0	0	0
Estimated # Enrolled	0	0	0
E. Media (radio - not a PSA or ad)	0	0	0
Total # of Attendees	0	0	0
Estimated # of Attendees	0	0	0
Estimated # Enrolled	0	0	0
F. Media (TV / cable show - not a PSA or ad)	0	0	0
Total # of Attendees	0	0	0
Estimated # of Attendees	0	0	0
Estimated # Enrolled	0	0	0
F. Media (public service announcement or paid ad)	0	0	0
Total # of Attendees	0	0	0
Estimated # of Attendees	0	0	0
Estimated # Enrolled	0	0	0
G. Booth / Exhibit at Health or Senior Fair / etc.	0	0	0
Total # of Attendees	0	0	0
Estimated # of Attendees	0	0	0
Estimated # Enrolled	0	0	0

Sponsorship Performance Measures

H. Targeted informational mailings	0	0	0
Total # of Attendees	0	0	0
Estimated # of Attendees	0	0	0
Estimated # Enrolled	0	0	0
I. Website (web postings, online conference, chatroom, etc.)	0	0	0
Total # of Attendees	0	0	0
Estimated # of Attendees	0	0	0
Estimated # Enrolled	0	0	0
J. Other (please describe)	0	0	0
Total # of Attendees	0	0	0
Estimated # of Attendees	0	0	0
Estimated # Enrolled	0	0	0

(These factors or resources are indicators that lead to: number of volunteers needed to serve county / work area, number of outreach sites, number of community partners, and number of trainings that are staged)